

How to Add/Manage Contacts

This is an instructional guide designed to help you add contacts to your MLS.

Note: The information displayed is random.

Step 1) Find the Contacts Page:

- Click on "Contacts" then "Contact Management"

flexmls Quick Launch

Dashboard Add/Change Search Daily Functions **Contacts** Statistics Taxes Preferences Other

MLS

Hot Sheet

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Step 2) Adding a Contact:

- There are two ways to add a contact
- 1) Through the "Quick Add Feature at the top:

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Dashboard Add/Change Search Daily Functions **Contacts** Statistics Taxes Preferences Other Spark Admin

Contact Management

Quick Add: First Name: Last Name: E-mail: Portal + Add

Search:

Name	Portal	Phone	E-mail
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- Simply just add the contacts First and Last name, their email, and if you would like for them to have a portal then check the box next to the word "Portal" then hit the green "+" next to "Add".

- 2) The second way is to hit "Add Contact in the top right corner of the screen:

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Contact Management

Quick Add: First Name: Last Name: E-mail: Portal + Add

Search:

Name	Portal	Phone	E-mail	Listings to Approve	Listings	Last Match
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- Once you click on the “Add Contact” button you will be given all the fields you can fill in for the contact you are adding:

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Contact Management

Name:
Name:
Additional Contact:
Organization:
E-Mail:
[+ Add](#)

Groups: None [+ Add](#)
[Edit Group List](#)

Primary: **Mobile:**
Home:
Office: **Other:**
Fax: **Pager:**

Home:

Office:

Reverse Prospecting
No Additional Info [+ Add](#)

Create a Portal Account for this Contact
An e-mail with the portal login name and password will automatically be sent

A portal is a way for you to constantly be connected to your contact. Think of it as a personal web page you can share with your contact

- At the very bottom make sure to hit “Add Contact” once you are done, or hit “Cancel” if you want to discard your entry.

Step 3) Managing a Contact

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Quick Launch

Dashboard Add/Change Search Daily Functions **Contacts** Statistics Taxes Preferences Other Spark Admin

Contact Management

Quick Add: First Name: Last Name: E-mail: Portal Add

Search:

Name	Portal	Phone	E-mail	Listings to Approve	Listings
John Smith	ON	(555) 123-4567	Sample@Test.com	0	0
	OFF			0	0
	OFF			0	0
	OFF			0	0
	OFF			0	0

John Smith Searches/Auto E-mail Portal Messages Notes Listing Notes Links

John Smith
Sample
Sample@Test.com

Group: None

Primary: (555) 123-4567 Mobile: (111) 234-5678
Home: Other:
Office: Pager:
Fax:

Home: 1234 Elm St., Albany, NY 11408
Office: Fictional Office Group, 1235 Elm St., Phoenix, AZ 88888

Reverse Prospecting:

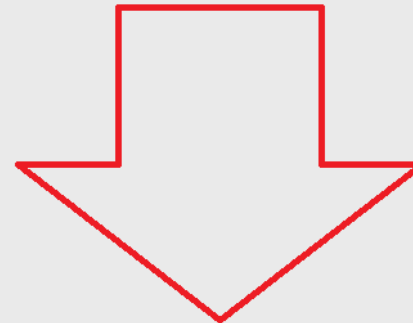
Enabled

E-mail Activity:

Manual: 0, Viewed: 0

Total Activity:

Manual: 0, Viewed: 0



Edit Contact Remove Deactivate Transfer

- Once you click on your contacts name you are given a set of options
- You can view your contact information, portal, send messages, write notes, share links and much more from this screen.
- You can also at the very bottom edit the contact, remove (Delete) the contact, deactivate (turn off their portal), or transfer your contact